

Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:
RECEIVED
SECRETARY OF THE SENATE
PUBLIC RECORDS

2019 OCT 23 AM 9:48

Post-Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building.

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
☒ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): National Coordinating Committee for Multiemployer Plans

Travel date(s): 9/22-9/23/19

Name of accompanying family member (if any): N/A

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING DID NOT INCREASE DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	\$219.96	\$140.12	\$57.45	\$120.46 (cabs)
<input checked="" type="checkbox"/> Actual Amount				

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate				
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): NCCMP Annual Conference: I attended the following panels that preceded mine: Update from the Department of Labor and Outlook of the PBGC as well as the Managing Risk in Defined Benefit Plans panel

I participated in the panel, View from the Hill- The Need for Unity. (see attached Agenda at a Glance)

10/22/19
(Date)

Kendra Kosko Isaacson
(Printed name of traveler)

Kendra Kosko Isaacson
(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

10/23/19
(Date)

Patty Murray
(Signature of Supervising Senator/Officer)

SECURING
OUR FUTURE.
TOGETHER.

The Diplomat Beach Resort Hollywood, FL

[illegible]



THANK YOU FOR STRENGTHENING THE LABOR MOVEMENT

Ullico is a proud supporter of the NCCMP and its dedication to protecting multiemployer plans. We share your commitment to securing a prosperous future for America's workers.

For more than 90 years, our mission has been to deliver innovative solutions tailored to the needs of unions. Today, the Ullico Inc. family of companies provides insurance and investment solutions for labor organizations, union employers, institutional investors and union members.

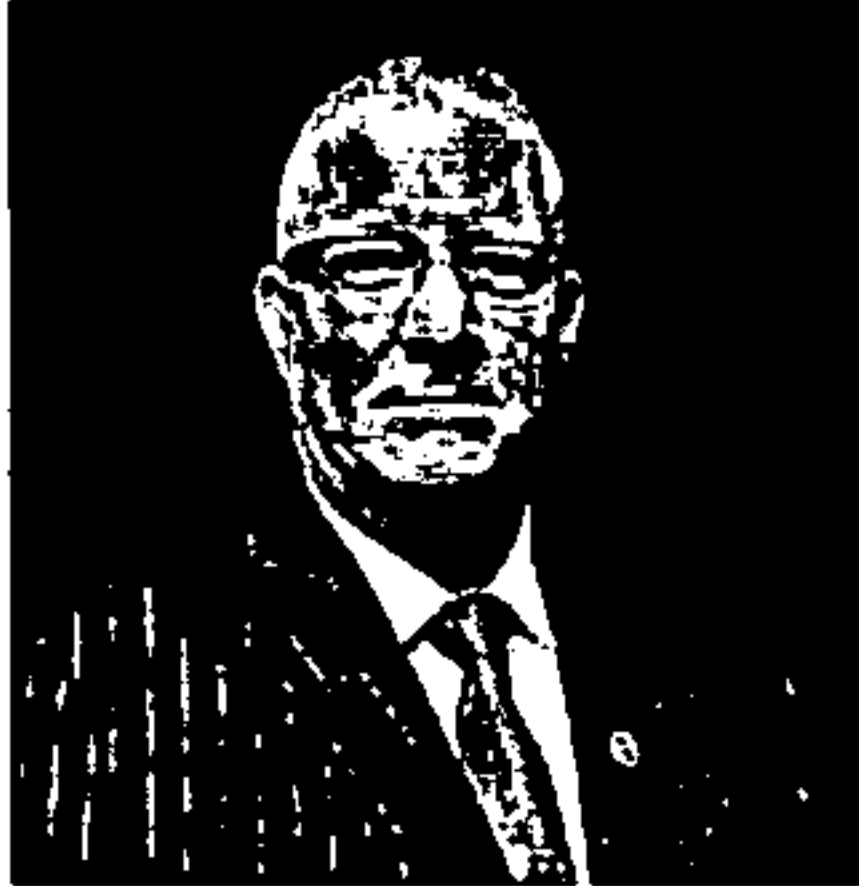
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AT A GLANCE

SATURDAY, SEPTEMBER 21, 2019		
11:30-2:00	CONFERENCE REGISTRATION	HOTEL LOWER LOBBY
1:30 - 4:30	MANAGING RISK FOR A SUSTAINABLE FUTURE	ROOM 212/213
SUNDAY, SEPTEMBER 22, 2019		
7:00 - 8:00	GOLF REGISTRATION AND BREAKFAST	THE TURNBERRY RESORT AND SPA
8:30 - 12:30	NCCMP DAD'S DAY GOLF OUTING	THE TURNBERRY RESORT AND SPA
12:30 - 2:30	GOLF AWARDS & LUNCHEON	THE TURNBERRY RESORT AND SPA
2:30 - 4:30	CONFERENCE REGISTRATION	HOTEL LOWER LOBBY
6:30 - 9:30	WELCOME RECEPTION	SOUTH PALM COURT
MONDAY, SEPTEMBER 23, 2019		
7:00 - 12:00	CONFERENCE REGISTRATION	GRAND REGISTRATION
7:00 - 8:00	BREAKFAST	GRAND BALLROOM EAST
8:00 - 8:15	OPENING CEREMONY	GRAND BALLROOM WEST
8:15 - 8:30	OPENING REMARKS	GRAND BALLROOM WEST
8:30 - 9:00	* UPDATE FROM THE DEPARTMENT OF LABOR	GRAND BALLROOM WEST
9:00 - 9:30	* OUTLOOK OF THE PBGC	GRAND BALLROOM WEST
9:30 - 9:45	* VIEW FROM THE HILL - THE NEED FOR UNITY	GRAND BALLROOM WEST
9:45 - 10:00	* SENATE ROUNDTABLE	GRAND BALLROOM WEST
10:00 - 10:45	BREAK	GRAND BALLROOM EAST
10:45 - 11:00	UPDATE FROM THE NCCMP	GRAND BALLROOM WEST
11:00 - 11:30	EXCESSIVE FEE LITIGATION IN DEFINED CONTRIBUTION PLANS	GRAND BALLROOM WEST
11:30 - 12:00	CREATING GOOD JOBS AND SECURE RETIREMENT THROUGH RESPONSIBLE INVESTMENT	GRAND BALLROOM WEST
12:00 - 12:30	* MANAGING RISK IN DEFINED BENEFIT PLANS	GRAND BALLROOM WEST
12:30 - 2:00	BREAK FOR LUNCH	
2:00 - 3:15	WORKSHOPS - SESSION 1	
	OPTION 1: CONTEMPORARY COMPLIANCE ISSUES	ROOM 212/213
	OPTION 2: LOST PARTICIPANTS AND THE DOL AUDIT PROCESS	ROOM 214
3:30 - 4:15	WORKSHOPS - SESSION 2	
	OPTION 1: LAWYERS AND ADMINISTRATORS MEETING	ROOM 212/213
	OPTION 2: WHAT THE HECK IS GOING ON AT THE NLRB?	ROOM 214
5:00 - 6:00	RECEPTION	GRAND BALLROOM EAST
TUESDAY, SEPTEMBER 24, 2019		
7:00 - 12:00	CONFERENCE REGISTRATION	GRAND REGISTRATION
7:00 - 8:00	BREAKFAST	GRAND BALLROOM EAST
8:00 - 8:15	OPENING REMARKS	GRAND BALLROOM WEST
8:15 - 8:45	MULTIEMPLOYER PENSION REFORM IN 2019	GRAND BALLROOM WEST
8:45 - 9:30	WHOSE DATA IS IT ANYWAY?—A FIDUCIARY PERSPECTIVE	GRAND BALLROOM WEST
9:30 - 10:15	CONTROLLING PRESCRIPTION DRUG COSTS	GRAND BALLROOM WEST
10:15 - 10:30	BREAK	GRAND BALLROOM EAST
10:30 - 11:00	HEALTHCARE LEGISLATIVE UPDATE	GRAND BALLROOM WEST
11:00 - 11:45	SURPRISE MEDICAL BILLS AND OUT OF NETWORK CLAIMS	GRAND BALLROOM WEST
11:45 - 12:15	UPDATE FROM THE ALLIANCE TO FIGHT THE FORTY	GRAND BALLROOM WEST
12:30 - 2:00	GEORGE MEANY AWARD LUNCHEON	GREAT HALL 3
2:00 - 3:15	WORKSHOPS - SESSION 3	
	OPTION 1: HEALTHCARE ALLIANCES	ROOM 212/213
	OPTION 2: MENTAL HEALTH MATTERS	ROOM 214
3:30 - 4:45	WORKSHOPS - SESSION 4	
	OPTION 1: GENETIC TESTING AND GENE THERAPY	ROOM 214
	OPTION 2: ASK THE REGULATORS	ROOM 212/213
WEDNESDAY, SEPTEMBER 25, 2019		
7:30 - 10:00	CONFERENCE REGISTRATION	GRAND REGISTRATION
7:30 - 8:30	BREAKFAST	GRAND BALLROOM EAST
8:30 - 8:45	OPENING REMARKS	GRAND BALLROOM WEST
8:45 - 11:00	AGENCY UPDATES	GRAND BALLROOM WEST
11:00 - 11:45	OPEN FORUM	GRAND BALLROOM WEST
11:45 - 12:00	CLOSING REMARKS	GRAND BALLROOM WEST
12:00	ADJOURNMENT	

WELCOME TO THE 2019 NCCMP ANNUAL CONFERENCE



Welcome to the 2019 NCCMP Annual Conference. We are pleased to again host this gathering at the Diplomat Beach Resort and hope that our excellent panels of experts, the opportunity to engage with your peers, and the activities available at this wonderful resort will provide you with a valuable and enriching conference experience.

The challenges facing the multiemployer community have never been greater, especially following the Senate and House Joint Select Committee's failure to formally recommend any legislation. The Board of Directors of the NCCMP and the NCCMP staff continue to actively engage with legislative and executive branch policymakers, business leaders, unions, employers, technical experts, and leading scholars in an effort to form solutions and solidify consensus.

The elephant in the room is to successfully restore solvency to the troubled plans. This is critical to their participants, employers, every other multiemployer plan, and ultimately, the U.S. taxpayer. Any failure to do so will devastate the retirement of these participants and lead to the collapse of the PBGC's multiemployer guarantee program. This will directly and indirectly negatively impact every other multiemployer plan. The U.S. Government and taxpayer will lose more than \$3 billion in tax revenue annually and see their safety net entitlement programs expand by at least \$14 billion annually.

Our challenge for "healthy" plans remains to provide plan sponsors with new, voluntary tools designed to fulfill promised benefits under the current defined benefit structure while attracting new employers to join these plans.

In May, the Board of the NCCMP adopted "Common Sense Principles for Multiemployer Pension Reform" that Congress should enact. These principles supported a liability removal program at the PBGC to deal with troubled plans, PBGC reforms that are affordable by plans, new

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Date/Time Stamp:

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220**. Incomplete and late travel submissions will **not** be considered or approved. This form **must** be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

ETHIC AUG21*19AM11:07

Name of Traveler: Kendra Kosko Isaacson

Employing Office/Committee: Senate HELP Committee - minority staff

Private Sponsor(s) (list all): National Coordinating Committee for Multiemployer Plans

Travel date(s): 9/22-9/23/19

*Note: If you plan to extend the trip for any reason you **must** notify the Committee.*

Destination(s): Hollywood, FL

Explain how this trip is specifically connected to the traveler's official or representational duties:

As Senior Pensions Counsel for the Senate HELP Committee, Kendra Isaacson handles all retirement issues for the Committee. She has been invited to provide a Congressional update on pending and potential legislation relating to solutions to address the multiemployer pension crisis.

Name of accompanying family member (if any): n/a

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

08/19/19
(Date)

Kendra Isaacson
(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, Patty Murray hereby authorize Kendra Isaacson
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

08/21/19
(Date)

Patty Murray
(Signature of Supervising Senator/Officer)

NATIONAL COORDINATING COMMITTEE FOR MULTIEMPLOYER PLANS

815 16TH STREET, N.W., WASHINGTON, D.C. 20006 • PHONE 202-737-5315 • FAX 202-737-1308



MICHAEL D. SCOTT
EXECUTIVE DIRECTOR
E-MAIL: MScott@NCCMP.ORG

Sent via email to:

[Kendra Isaacson@help.senate.gov](mailto:Kendra.Isaacson@help.senate.gov)

August 7, 2019

Ms. Kendra Isaacson
Senior Counsel, Pensions
Senate Committee on Health, Education, Labor
and Pensions, Minority Staff
428 Dirksen Senate Office Building
Washington, D.C. 20510

Re: Invitation to Address the 2019 National Coordinating Committee for Multiemployer Plans
(NCCMP) Annual Conference

Dear Kendra:

On behalf of Chairman Sean McGarvey and the Board of Directors of the NCCMP, it is my pleasure to extend to you this formal invitation to participate in our 2019 Annual Conference to be held September 21-25 at The Diplomat Beach Resort in Hollywood, FL. We anticipate that you would take part in a panel discussion among key Senate staff who are leading efforts on multiemployer pension reform in 2019. The panel discussion would take place on the morning of Monday, September 23rd.

As you know, the multiemployer defined benefit pension system is in crisis. While many multiemployer plans are in good financial health, a small portion of plans are deeply troubled and will become insolvent in the next few years. A few of these plans are systemically important, and their insolvencies will have a devastating impact on retirees, plan participants and sponsors, all levels of government, the U.S. economy, the PBGC, and the rest of the multiemployer system. As Congress works its way through consideration of the issues and potential solutions to stabilize and strengthen the multiemployer system and the PBGC, we would welcome your thoughts on the legislature's process and direction.

For your consideration, we would like to note that press is not invited to our event, although they are not expressly prohibited. That being said, in past years we have closed sessions to press, and we would be willing to do so again if it would facilitate your participation. We will also know in advance whether press plan to attend, as they must be registered conference attendees to be allowed into conference sessions, so we will be able to proactively control attendance during the sessions in which you participate. In addition, we would be happy to have any of your remarks be off the record.

The NCCMP is a nonprofit, non-partisan organization and the only national organization that advocates before Congress, the Administration, the regulatory agencies, and the Courts on behalf multiemployer retirement and health plans. Multiemployer pension plans have approximately \$600 billion in assets and support 10.4 million participants. Our healthcare plans support more than 20 million participants. Multiemployer plans are a joint collaboration between the job creating employers of America and labor.

20190807100000

Ms. Kendra Isaacson
August 7, 2019
Page 2

We expect that approximately 400 pension trustees, plan administrators, and professional advisors will attend this year's conference. The conference covers a broad range of issues relating to multiemployer plans. Our program on Monday, September 23rd will be dedicated to pension issues. The program on Tuesday will be a mix of pension and health care issues, and the Wednesday program will focus the on legislative and regulatory issues facing the multiemployer community.

Your participation would make an invaluable contribution to our program. If you have any questions, or if I can be of assistance in any way, please do not hesitate to call me at 202-756-4679 or Mariah Becker at 202-756-4637.

Regards,

Walt

Michael D. Scott
Executive Director

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PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should NOT submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): National Coordinating Committee for Multiemployer Plans
2. Description of the trip: Attend NCCMP Annual Conference to participate in a panel discussion focused on legislative solutions to the multiemployer pension crisis.
3. Dates of travel: Sunday, September 22, 2019 - Monday, September 23, 2019
4. Place of travel: Hollywood, Florida
5. Name and title of Senate invitees: Please see attached
6. I *certify* that the trip fits one of the following categories:
 - ☐ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
 - OR -
 - ☒ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
 - AND -
 - ☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:
 - ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
 - AND -
 - ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. USE ONLY IF YOU CHECKED QUESTION 6(B)

I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

- ☒ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

OR

- ☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (see questions 6 and 10).

OR -

- ☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. USE ONLY IF YOU CHECKED QUESTION 9(B)

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

- 12. Briefly describe the role of each sponsor in organizing and conducting the trip:**

NCCMP organizes an annual educational conference for multiemployer pension and health fund

Trustees, plan administrators, and plan professionals. NCCMP is the sole sponsor of this trip.

- 13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:**

NCCMP's mission is to educate and inform multiemployer Trustees, as well as the broader community

focused on multiemployer issues, on current issues facing multiemployer plans. Given the pressing need

for a legislative solutions to the pension crisis, staff participation will be critical to these efforts.

- 14. Briefly describe each sponsor's prior history of sponsoring congressional trips:**

This is the first Congressional trip that NCCMP has sponsored.

1. *Journal of Management Studies*, 1996, 33, 1, 1-14.

.....

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

Annually: NCCMP sponsors three major conferences each year, and provides numerous educational publications to our members and subscribers. NCCMP leadership and staff also routinely provide education at trade, professional, and other meetings each year.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate	\$250	\$121	\$40	\$0
<input type="checkbox"/> Actual Amounts				

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

NCCMP Annual Conference is arranged without regard to congressional participation.

18. Reason for selecting the location of the event or trip

NCCMP Annual Conference is frequently held at this location, as it is a convenient location for our attendees and it is close to both the Fort Lauderdale and Miami airports.

19. Name and location of hotel or other lodging facility:

The Diplomat Beach Resort, 3555 S Ocean Drive, Hollywood, FL 33019

20. Reason(s) for selecting hotel or other lodging facility:

NCCMP Annual Conference is frequently held at this hotel, as it is a convenient location for our attendees and it is close to both the Fort Lauderdale and Miami airports.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Lodging and meals are provided at or below the per diem rate for official Federal Government travel.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Coach class airfare will be provided.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

None provided.

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor: Marian M. Burke

Name and Title: Mariah Becker, Director of Research and Education

Name of Organization: NCCMP

Address: 815 16th Street, Suite 600

Telephone Number: 202 756 4637

Fax Number:

E-mail Address: mbecker@nccmp.org

Senate Invitees for 2019 NCCMP Annual Conference

- Kendra Isaacson, Senior Pensions Counsel (Senate HELP)
- Chris Allen, Senior Adviser, Benefits and Exempt Organizations (Senate Finance)
- Sarah Benzing, Chief of Staff (Senator Sherrod Brown)
- Drew Crouch, Senior Counsel, Tax and ERISA (Senate Finance)
- Lyndsey Seidman, Deputy Staff Director (Senate HELP)

Sunday, September 22

6:50 pm Arrive Fort Lauderdale airport
7:00 pm - 7:30 pm Travel to hotel
7:30 pm End day

Monday, September 23

7:30 - 8:00 Breakfast provided to all conference attendees
8:00 - 10:30 Attend conference plenary sessions.
10:30 - 11:15 Speak on Pension Reform Outlook in 2019 panel discussion
11:15 - 12:30 Attend conference plenary sessions.
12:30 - 2:00 Lunch on own
2:00 - 4:45 Attend conference workshop sessions
4:45 - 6:30 Prepare for departure / dinner on own
6:30 - 7:00 Travel to airport
8:20 Depart Fort Lauderdale airport

MONDAY, SEPTEMBER 23rd

8:00 – 12:30 *Plenary Session: Current Pension Issues*

Plenary Session: Current Pension Issues

Opening Ceremony

Opening Remarks

Sean McGarvey, President, NABTU and Chairman, NCCMP Board of Directors

Update from the Department of Labor

Jeanne Klinefelter Wilson (Invited), Deputy Assistant Secretary for Policy, Employee Benefits Security Administration

Outlook of the PBGC

The Honorable Gordon Hartogensis, Director of the PBGC

Roundtable on Multiemployer Pension Reform

Senate Staff (Invited):

Kendra Isaacson, Senior Pensions Counsel (Senate HELP)

Chris Allen, Senior Adviser, Benefits and Exempt Organizations (Senate Finance)

Sarah Benzing, Chief of Staff (Senator Sherrod Brown)

Drew Crouch, Senior Counsel, Tax and ERISA (Senate Finance)

Lyndsey Seidman, Deputy Staff Director (Senate HELP)

Break

Update from NCCMP

Michael Scott, Executive Director, NCCMP

Excessive Fee Litigation in Defined Contribution Plans

This session will discuss recent litigation involving Trustees of a multiemployer 401(k) plan, alleging that the Trustees breached their fiduciary duties as a result of excessive fees paid by the fund's participants to the fund's recordkeeper.

Creating Good Jobs and Secure Retirement through Responsible Investment

Moderator: Dan Pedrotty, Director, Capital Strategies, NABTU

This session will discuss capital strategies for pension funds.

Managing Risk in Defined Benefit Plans

This session will explore different tactics used by multiemployer pension plans to promote secure retirement benefits for participants.

12:30 – 2:00	Break for Lunch
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Break for Lunch

2:00 – 3:15 *Afternoon Workshops – Session 1*

Afternoon Workshops – Session 1

Option 1: Compliance Update

This workshop will explore current topics of interest to multiemployer plan Trustees, administrators, and professionals including recent updates on Agency guidance, recent litigation, and best practices.

Option 2: Missing and Lost Participants

This workshop will discuss current and best practices by plans to locate participants who have not maintained current address information in order to commence payment of benefits, as well as recent DOL audit activities on missing participants.

3:30 – 4:45 Afternoon Workshops – Session 2

Afternoon Workshops – Session 2

Option 1: Lawyers and Administrators Meeting

This interactive workshop will provide attendees with the opportunity to draw upon the experiences of their peers to discuss current issues they are facing in the day to day administration of their funds.

Option 2: What the Heck is Going on at the NLRB?

This workshop will discuss recent decisions issued by the National Labor Relations Board, including some that have overturned prior longstanding Board rulings.

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